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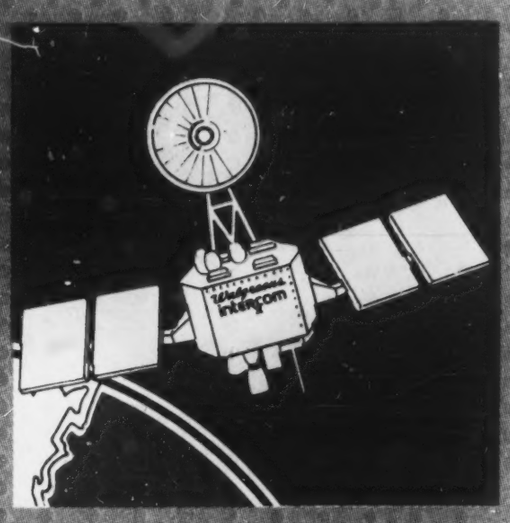
DRUG STORE NEWS

Vol. 11/No. 19 **Our 61st year of serving chains, wholesalers and high-volume independents** Published by Lebhar-Friedman Inc. Oct. 9, 1989

TOP OF WEEK FEATURES



Walgreens sponsors 'Nova' in Chicago

Susan Ball's "Ads and Promotions" column shows why this chain's execs jumped at the chance to be a local sponsor for this public television series. **Page 21.**

New looks, hot promos make waves in ethnic

Merchandising attention helps ethnic products go a long way, especially in aggressive retailers such as Perry and Harco. **Beauty Trends, page 23.**

LATE NEWS

• JACKSONVILLE, Fla. — Drug Emporium recently unveiled comprehensive Health Test Centers in three remodeled stores here, where a number of screenings can be done on-site.

• INDIANAPOLIS — The 120 Peoples Drug stores in Ind., Iowa, Ill., and Ky. bought in July by a team led by Roger Grass will be renamed Reliable Drugs, the company said.

• LIVERPOOL, N.Y. — Fay's Drug named Paul Novara gmm-H&BA and private label, replacing Frank Corcoran, who left. Douglas Best, Fay's OTC buyer, takes Novara's post of private label marketing manager.

• CLEARWATER, Fla. — Revco said it is selling its Woburn, Mass.-based Insta-Care Pharmacy Services Corp. to Eckerd for $7.1 million.

• CINCINNATI — Stanley Kohn, vp-professional services at HSI's SupeRx division, retires in November. David Lutz, currently pharmacy merchandise manager, will fill the post.

Generic controversy prompts chains to market 'confidence'

PONTIAC, Mich. — The ongoing generic drug controversy has prompted Perry Drug Stores to take out full-page ads in its biggest markets to try to calm public fears about the safety and quality of its generics. Other chains are considering similar moves.

The chain drug industry, and pharmacists in particular, are caught in the middle of a crisis in public confidence over prescription drugs and the legitimacy of the FDA's inspection and approval procedure. Although pharmacy executives and pharmacists defend the quality of their generics, they are dealing with an outbreak of consumer fears since the FDA/generic controversy came to light last summer.

Perry took an active role in dealing with those fears last month, when it ran full-page ads in the Sunday editions of *The Detroit News*, the *Detroit Free Press*, the *Oakland Press* and the *Flint Journal* to dispel concerns about generics. The boldtype ads advise customers "to make your pharmacist the first person you talk to" when discussing the quality of their prescription drugs.

'We felt we needed to tell our customers we were on top of the situation, reassure them, and steer them in the right direction.'

Signed by Perry chairman Jack Robinson, the ads also advise patients not to change their medication.

"We felt there were a lot of people who didn't necessarily even know where to go for information about this controversy," noted Bob Shapiro, vp-professional affairs for Perry. "We felt we needed to tell our customers we were on top of the situation, reassure them, and steer them in the right direction."

The ads also underscore Perry's attempts to keep its pharmacists up to date with information about the ongoing investigation of the FDA and the generics industry. "What the ad does is bring out again that pharmacists can be relied on to perform an important public service," Shapiro said. "We've been updating our pharmacists with new reports as

See **Generics,** *page 39*

LBOs motivating lean, mean retail machines

Part II in a series on leveraged buyouts in the chain drug and supermarket industries.

By James Frederick
with research assistance from Susan Ball

Focus on **LBOs**

The junk bond market is in a state of turmoil. Respected economists and business writers are beginning to question the whole concept of leveraged buyouts and the debt financing that makes them possible. Even junk bond king Michael Milken called in *The Wall Street Journal* for a return to equity-based financing in American business. With the default of highly leveraged Campeau Corp. and other firms, the word on Wall Street is that the era of highly leveraged takeovers and insider-led buyouts may be nearing an end.

True or not, the problems of Campeau, Revco D.S., Dart Drug Stores and other highly leveraged companies at least underscore one important conclusion: There's nothing like a good takeover scare or a serious debt crisis to turn a dormant drug or food chain back into a lean, mean, fighting machine.

The changes can be painful for both companies and individual employees who find themselves out of work. But the pressures induced by an LBO or a defensive restruc-

Continued on page 21

SupeRx marches out of Georgia, sells 10 stores to Thrift Drug

ATLANTA — Phoenix-based SupeRx, Inc. has pulled out of Georgia with its sale of 10 SupeRx stores here to Thrift Drug. The Pittsburgh-based operator will convert the stores into its Treasury Drug format, broadening its base in this hotly competitive market.

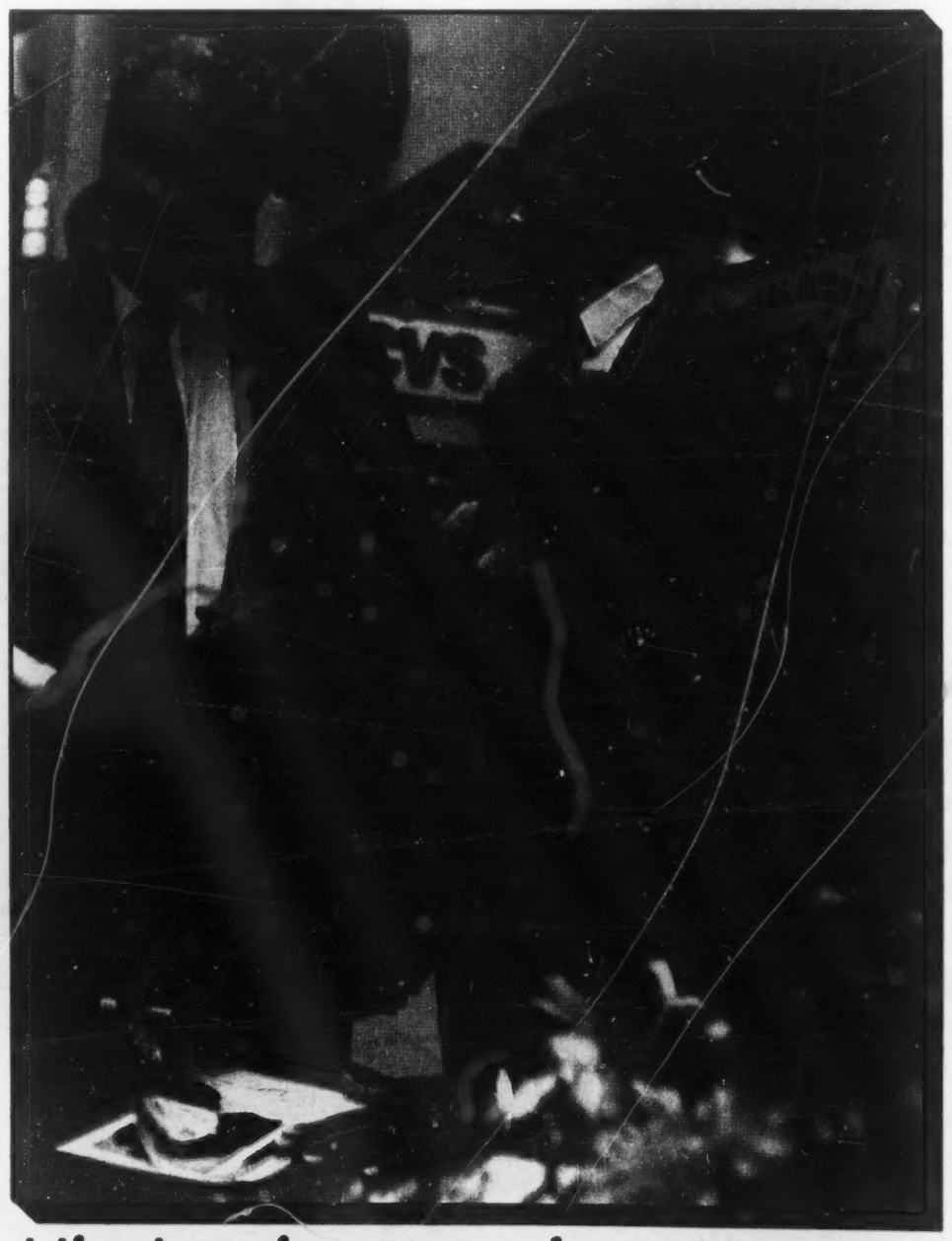
The sale stems from SupeRx's purchase last November of Medicare-Glaser, which grew SupeRx's store base from 63 stores to 173 stores, Jim Jumpeter, chief financial officer, told *Drug Store News*. SupeRx is training its focus on Phoenix and St. Louis; building in Atlanta was never part of the chain's long-range plan, he added.

"With a stronger store base, we can reevaluate and reassess where we want to operate, and take some specific action on assets not performing according to our expectations," said Jumpeter. The chain has no immediate plans to sell any other assets, including 12 stores spread throughout Alabama.

"We're going to assess each store and each market on its ability to stand alone," Jumpeter said. The SupeRx stores in Atlanta are profitable, he was quick to add, noting that five are freestanding and the rest in shopping centers or malls.

Thrift, for its part, now operates 52 Treasury stores in Great-

See **SupeRx,** *page 39*



Miss America starts reign at Mass. CVS

NORTH ATTLEBORO, Mass. — Debbye Turner, the newly crowned Miss America, made her first public appearance at CVS, Emerald Square Mall here late last month. Turner signed autographs and greeted CVS shoppers outside the store, while Ed Ferullo, key account manager of Gillette's Hingham, Mass., office, handed out free samples of bath soap. Photo: Mark Stockwell

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NEWS IN BRIEF

P&G acquiring Noxell in stock swap

CINCINNATI — Procter & Gamble, in a stock-swap agreement valued at $1.3 billion, will acquire Noxell Corp., maker of skin care goods and cosmetics.

Under the agreement, P&G will exchange 0.272 shares of its common stock for each of Noxell's 40.5 million common and class B shares. The tax-free transaction, based on P&G's closing price, would have a value of $32.60 per Noxell share.

The acquisition adds Noxell's Cover Girl and Clarion lines, and the Noxzema skin care line, to P&G's portfolio. Although P&G has a number of skin care products, such as Oil of Olay, Bain de Soleil and Clearasil, the purchase launches the company into the world of women's cosmetics.

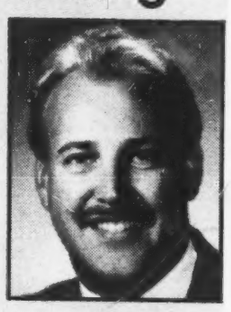
Walgreen continues Bay-area growth

SAN FRANCISCO — Walgreen Co. continues to expand in the San Francisco Bay area of Northern California. The chain opened five new units in the Bay region in the fiscal year ended in August, and is "shooting for eight more stores there in fiscal '90," according to company spokesman Tom Mammoser.

"We see the whole San Francisco Bay area as having potential for growth," he said recently.

In January, Walgreen president Fred Canning said that the chain would open at least 15 new units in that market by 1991. Walgreens currently operates 59 stores in the region.

Perry names Lund vp-merchandising



PONTIAC, Mich. — Stephen Lund has been promoted to vp-merchandising at Perry Drug Stores, reporting to drug store group vp-marketing David Green.

Lund, a 13-year Perry veteran, last served as assistant vp-H&BA merchandising.

"Steve Lund is an outstanding manager and he has been extremely effective in the merchandising of health and beauty aid products and our private label department," said Green. "I expect he will continue to make significant contributions to the company."

Med Shoppe tabs vp-store develop.

ST. LOUIS — Medicine Shoppe International has promoted Ronald Hofmeister to senior vp-store development responsible for the nationwide activities of MSI's operations, franchise development, acquisition and conversion and real estate departments.

Hofmeister, who has held many key positions since joining Medicine Shoppe in 1971, was most recently responsible for systemwide operations and franchise training. Before joining MSI, he was a pharmacist manager with the Osco Drug division of Jewel Companies, and, from 1969 to 1971, was a professional baseball player with the Baltimore Orioles organization.

A registered pharmacist, Hofmeister graduated from the University of Minnesota College of Pharmacy. He is an active member of the American Management Association, NACDS, NARD and the International Franchise Association, and has served on several committees of the American Pharmaceutical Association.

K&B bows small New Orleans unit

NEW ORLEANS — K&B opened a store last month in the Lakeview area here. At 6,500 square feet, the unit, formerly an independent drug store, is about half the 12,500-square-foot average for K&B stores.

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Coutu keeps 11 Cloutiers in deal closing this month

LONGUEIL, Québec — The Jean Coutu Group (PJC) is finalizing plans to purchase 15 of 23 Cloutier drug stores from Metro Richelieu, a local supermarket operator. Jacques Masse, executive vp-acquisitions and expansion of the 151-store Canadian chain, told *Drug Store News*, "We'll take possession of the stores in mid-October. Right now we're still having difficulties with the franchisees."

François Coutu, executive vp-pharmacies and public relations, confirmed, "On our side it's ready. Metro had some problems arranging this with their franchisees." He said that the chain will purchase the 15 Cloutier units and will close four of them, because these four stores are either too close to existing Coutu stores or are in bad locations. The chain will even close a year-old Cloutier store because it's down the street from a Coutu store.

"It's a consolidation of some areas we're not that strong in — especially north of Montreal," Coutu said.

The 15 Cloutier stores average 8,000 square feet and have a sales potential of $60 million. The purchase will give Coutu an almost 30-percent share of the pharmacy and OTC drug store market in Quebec, Coutu estimates. The chain also hopes to surpass the $1 billion mark in sales this fiscal year.

Plans to change the interior layout of these stores will be gradual. Coutu said it won't do much except change banners before Christmas.

In other news, Coutu's Ontario expansion plans are taking a different turn. With three stores currently operating in Ontario, the company planned initially to enter the region quickly with a major purchase, but since it is unable to find a seller in this market, its strategy now will be to enter Ontario on a store-by-store basis, through independent purchases. This move is expected to begin at the end of this year.

The company also plans to open six new stores to be built from the ground up by the end of this year.

Drug stores rally in Hugo's wake to provide Rxs, supplies to S.C.

By Christine Bizzarro and Susan Ball

CHARLESTON, S. C. — After Hurricane Hugo blew through the Carolinas, drug stores hurriedly cleaned up their damaged stores and reopened for business, providing prescriptions and emergency supplies to residents.

At press time, people in parts of North and South Carolina were waiting for power to be restored, five days after the storm. Heavy rains caused flooding, delaying efforts to restore drinking water.

Revco, with 269 stores in North Carolina and 189 in South Carolina, gave away bottled water to customers on Monday, Sept. 25, in Charleston, S.C.

Kathy Obert, spokeswoman for Revco, which operates 22 stores in Greater Charleston, said: "We started giving out two gallons of water per customer on Monday morning."

Revco issued public service announcements to radio stations, the newswires and TV stations, Obert said. "We told people to consult their Revco pharmacist or physician on questions about their maintenance medications, and we stressed that patients shouldn't be without their blood pressure, diabetes, thyroid and heart medications. We also told people which emergency stores were open in their area," Obert said. She said that when Revco stores initially opened, primarily for emergency items and prescriptions, she heard reports that shoppers were lined up "50 and 60 deep."

Charleston customers were also lining up at Rite Aid stores, which were among the first retailers of any kind to open after Hugo, a Rite Aid spokeswoman said. Before the hurricane hit, all Rite Aid stores were boarded and taped, floor displays and bottom-shelf merchandise were moved higher, and pharmacy computer disks were removed. On Sept. 21, Rite Aid more than tripled its scheduled shipments of bottled water and batteries to its Columbia, S. C., DC for distribution to its 20-plus stores in Greater Charleston, and was still rushing supplies daily to affected areas at press time. Candles, charcoal, grills, beer and toys were other items in demand.

Rite Aid store planning and operations teams, as well as construction companies the chain had contacted, were on site, ready to start repairs. Although Rite Aid stores generally were not badly damaged — mostly flooding and windows out — the back wall of one unit was lost to the storm, and only three stores had electricity; the rest were running on generators. Early on, pharmacists tending darkened stores filled prescriptions by flashlight.

> On Sept. 21, Rite Aid more than tripled its scheduled shipments of bottled water and batteries to its Columbia, S. C., DC.

Ruben Johnson, executive vp for 22-store Crown Drugs of North Carolina, said, "We didn't expect much damage and didn't get much." In three of its stores, Johnson said, the power went out for several hours. "We stayed open and waited on customers the old way, with calculators at the registers and pharmacists pulling out old typewriters."

Pharmacists also filled prescriptions on manual typewriters at Sentry Discount Drugs. The company operates two stores in Columbia, S. C., which experienced a four-day power outage, but Doug Sutton, buyer, said they remained open to sell such emergency items as batteries, lanterns and prescriptions. "We hooked up a 12-volt battery for light in the pharmacy and used a manual typewriter," Sutton said.

Sutton told *Drug Store News* of one loyal Sentry shopper who came up to him on Sept. 23, while Sutton was manning the store entrance, allowing only a few customers in at a time. "I just wanted to say thank you," she told Sutton, who replied, "That's what we're here for." Sutton then realized she had just filled her blood pressure medication and was obviously shaken by Hugo's wrath. He helped her into the store's office and gave her water to take her medication.

Problems in St. Croix

Meanwhile, in the Virgin Islands, St. Croix, which had been devastated by Hugo on Sept. 17, still did not have a pharmacy open by Sept. 27. Pharmacist Gayle George, of St. Thomas Apothecary, said she was sending what she could to the stricken island, including sanitary napkins, insect repellent, alcohol, toilet paper and toothpaste. "There is no insulin on St. Croix," she told *Drug Store News*. "We're waiting for a shipment of batteries to send, but they haven't come yet. It's been real tough."

A customer in her store who had flown from St. Croix to get prescriptions filled for his family was planning to take back any supplies she could contribute.

Marvin Goldman, chairman of Gulf Distribution in Miami, Fla., was helping to organize a relief effort for Virgin Islands pharmacists in his capacity as chairman of the Pharm-Assist Committee of the Dade County Pharmacy Association.

Goldman said, "St. Thomas wasn't too badly hit, but St. Croix was pretty well knocked flat. We still don't know whether some [pharmacy operators] are dead or alive yet."

OPINION

Positive action key to generic woes

IN THE MARKET
BRUCE BUCKLEY

As the generic story unfolds, I think there are several observations that need to be stated:

- Generic drugs will continue to be the key to pharmacy cost-containment in the '90s.
- The retail drug store industry has a large stake in the safety and efficacy of generic drugs.
- After some tough actions by government and the generic industry itself blow away the stench, the industry will emerge as stronger and, in the public mind, as reliable as ever.

That's why it was good to see the proactive approach being taken by Perry Drug and others (including NACDS) in approaching the difficult situation created by the generic drug scandal.

Perry's approach has been to go to the public with full-page ads designed to "clear up any confusion and to restore your peace of mind" about generics. The instrument for this reassurance? Perry's knowledgeable pharmacists. The chain keeps its pharmacists up to date on the situation by issuing once- or twice-weekly bulletins. Use of the pharmacists also underscores their role as key health care providers and consultants, a long-term benefit to Perry and the drug store industry.

Other chains, such as Medic Discount Drug in Cleveland and Harco Drug in Tuscaloosa, Ala., are also acting positively to the controversy instead of burying their heads in the sand. NACDS is supplying all its members with valuable information about developments in its Generic Drug Update.

The efforts of these and others show just how strong and effective the drug store industry can be when it comes to a threatening storm.

* * *

I have a tip for you. The next time you fly into New York's LaGuardia Airport with midtown Manhattan as your destination, ask the cabbie to take you into the city by way of the 59th Street Bridge. If you're going to any midtown destination, that route will save you about six bucks over the usual Triboro Bridge route, without any loss of time.

If you take my advice, however, be prepared to endure the sulkiness (if not downright abuse) of your cab driver, who counts on the three extra miles of the Triboro route to make up for his/her airport waiting time.

I add this warning because I just encountered the extreme end of New York cabbie surliness and abuse when I requested my usual route from LaGuardia to our office in midtown. (Tip: I always ask for a favorite route of cabbies themselves when they return empty to Manhattan after dropping off fares at one of New York's airports: Grand Central Parkway to Crescent Street to the 59th Street Bridge.)

To make a long story short, after a brief, but salty diatribe about my ignorance concerning Queens, N.Y., streets (where I grew up), the cabbie took me to the 59th Street Bridge, all right, but chose his own route, which added eight blocks and five minutes to the ride. So much for customer preferences.

I could have taken down the cabbie's name and number and complained to the Taxi Commission. But I didn't. Just as I don't complain to the manager of my local drug store or supermarket when a sales clerk is surly or slow.

A wimp, you say? Perhaps. But I would guess that the vast majority of Americans choose to suffer in silence when encountering poor or overbearing service or no service at all. They just get even the next time by selecting another store (or bank or airline or whatever). There's no great revelation in this. It's something that every retailer knows in the bones. The best operators maintain constant vigilance and reward top-notch service. Their own reward is increased sales and profits.

Now, can anyone tell me a fast, reliable alternative to New York City taxis?

Handicapped rights bill to impact industry

WASHINGTON PERSPECTIVE
KEN RANKIN

Congress is closing in on legislation offering broad new civil rights protections to the disabled — a bill with potentially far-reaching implications for the drug store industry.

The version passed by the Senate last month by a lopsided 76-to-8 vote would ban job discrimination against the handicapped and require retail pharmacies and other employers to make "reasonable accommodations" to facilitate the employment of disabled job applicants.

What does Congress consider a "reasonable accommodation?" Among other things, drug chains and independent pharmacies could be required to "restructure" job duties or assignments, switch to "part-time or modified work schedules," and make "appropriate changes" in personnel policies, training materials and employment examinations.

In addition, the bill states that employers may also be expected to modify existing workplace equipment or purchase special new "devices" to accommodate disabled workers. Moreover, drug stores could even be required to hire additional personnel, such as "qualified readers and interpreters" to assist handicapped individuals with their job duties.

Those new employment rules are only one part of this legislation. A potentially even more controversial section of the bill outlaws discrimination against the disabled in "public accommodations." which the legislation defines to include retail stores such as "pharmacies."

Under this provision, drug stores would be obliged to take affirmative steps to become more accessible to the handicapped.

A key element of the bill requires that drug stores and other places of public accommodation be made structurally accessible to individuals in wheelchairs and other handicapped individuals.

Stores undergoing "major structural alterations" as well as new facilities opened 30 months after enactment of the bill must make physicial changes to ensure that "the paths of travel to the altered area and the bathrooms, telephones, and drinking fountains serving the remodeled area, are readily accessible to and usable by individuals with disabilities."

Even pharmacies not undergoing renovations would be expected to take all "readily achievable" steps to remove architectural barriers to the handicapped.

How much would structural changes cost? Plenty. Sen. Orrin Hatch (R-UT), who sought unsuccessfully to compensate independent druggists and other small businesses for these expenses via tax credits, told Congress that modifying restrooms to accommodate the handicapped alone could cost some $2,000 to $3,000 per unit.

Operators found in violation of the new anti-discrimination rules could be slapped with fines of up to $50,000 for the first infraction and $100,000 for the second.

The legislation has the support of the Bush Administration and is likely to pass this fall.

The employment discrimination ban does not take effect until 2 years after final enactment, and then independent pharmacies and other small businesses with fewer than 25 workers will be exempt. Two years later that exemption will be pared back to exclude only firms with less than 15 employees.

In contrast, the public accommodation provisions take effect 18 months after enactment, and even the smallest businesses would be covered by these rules.

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BEAUTY TRENDS

From the top: "Different World" Jasmine Guy uses oil sheen sprays to enhance her naturally curly hair. Phylicia Rashad, from "The Cosby Show," opted for a rounded crown with full, slightly layered bangs to give her a soft, free-flowing look. Singer Whitney Houston uses extensions to enhance her image. Holly Robinson of "21 Jump Street" shed her long locks in favor of a chic crop and gained greater styling freedom. Top three photos courtesy of *Sophisticate's Black Hair Styles & Care Guide*. Bottom photo ©*Sophisticate's Black Hair Styles & Care Guide*.

New looks, hot promos making waves in ethnic

Drug chains commonly report 4 to 5 percent increases in ethnic sales, though the most aggressive retailers—Perry and Harco among them—are experiencing up to 12 to 15 percent gains in high-volume ethnic stores. Merchandising attention goes a long way at these operators.

Industry sources state the category has changed little since spring and there are few noteworthy new products stimulating purchases.

Jim Normandin, buyer at Beauty Enterprises in Hartford, Conn. notes that bonus sizes are driving the category just as last year and that TCB has done an exceptional job in generating sales and market share growth through some very aggressive bonus size promotions.

However, a number of distributors including Normandin think that the fall/winter period might get much better, helped by the popularity of a new salon look created by Soft Sheen, one of the leading ethnic product suppliers.

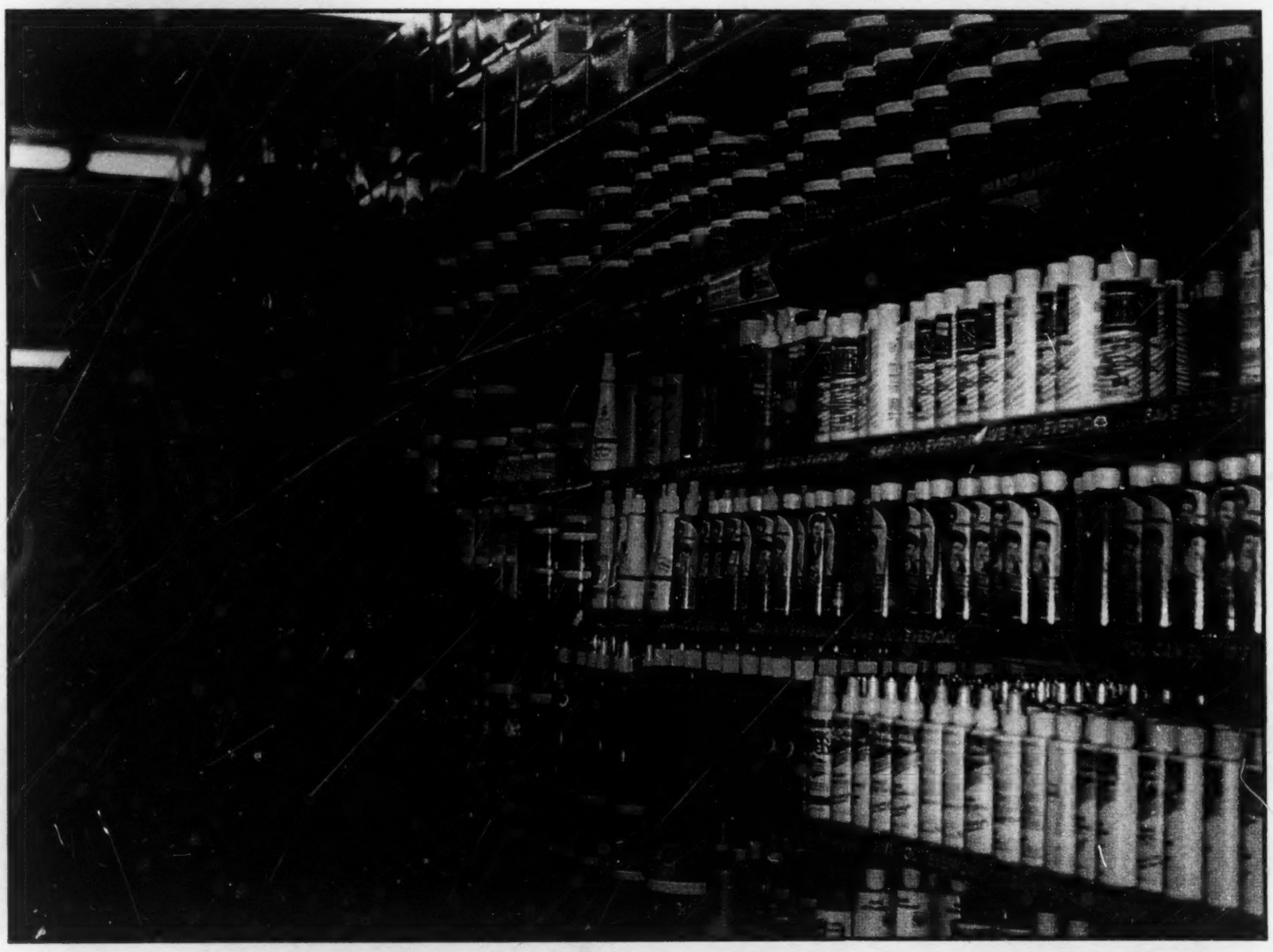
The style is called Wave Nouveau, described most often as a body wave or "dry" curl. Sources call it one of the hottest looks on the market. Among them, Normandin says the Wave Nouveau mist and lotion that Soft Sheen sells to women through salons exclusively are the "hottest" salon maintenance products he's seen in years.

Soft Sheen is introducing a retail version of those maintenance products to the mass market. Most ethnic product buyers think these items, which are shipping now, could be real winners. At least two other manufacturers, Pro Line and Worlds of Curls, are also coming out with maintenance products for the dry curl.

Normandin says he thinks the Soft Sheen dry curl maintenance products "will be in the top 10 dollar sales in their first six or seven months" because these products support a new type of hair style."

In the Midwest, Dan Medow, president of Standard Distributing, also felt the Soft Sheen Mist and Lotion could do well.

Medow, noting that other manufacturers are coming out with similar products also targeted toward the Wave Nouveau/dry wave customer, says he thinks this is a good early sign that dry wave products could be the next hot growth area.



Courtesy of *Sophisticate's Black Hair Styles & Care Guide*.

Ethnic shoppers respond to stores that stock a broad product assortment at low everyday prices.

"The Wave Nouveau look is a good style," he said. "It's popular. But the faster they bring the products out, the better it will be."

"Dry look maintenance products should do great," added Chuck Lewman, president of Paul's Sundries in Los Angeles. "Soft Sheen has built a large enough clientele so there should be

Continued on page 26

Buyers pinpoint ethnic "leaders of the pack"

Ethnic product buyers agree that several suppliers and particular lines have outdistanced the rest of the category in innovation and growth during 1989. They cite these efforts as having led this year's single-digit ethnic growth, and building promise for 1990.

They mentioned most often: Revlon, particularly with its Creme of Nature line; Schering-Plough, particularly with Artra; Lustrasilk, especially with Right On and Right Back; Kiwi with Ambi; Luster Products, especially with Pink Oil and S-Curl; Pro-Line, particularly with its relaxer kits; Carson with Dark & Lovely; Supreme with its Raveen relaxer kits; Johnson Products with Gentle Treatment; Worlds of Curls with its gels and moisturizers; and Soft Sheen with Care Free and Optimum Care.

Among the smaller, more regional companies, buyers also singled out Little Rock-based J.M. Products for Stylecrest ISOLPLUS; Atlanta-based W & W Pharmaceuticals for Back Alive Curl Revitalizer; and Chicago-based D'orum for Leisure Curl.

Soft Sheen

Soft Sheen is regarded by sources as the strong supplier in ethnic because its management knows salon trends from its salon division, enabling the company to react quickly.

"They know the trends and they start the trends," says Jim Normandin, ethnic buyer at Beauty Enterprises. "They started it with Care Free in the salons years ago and they did it again with Optimum Care earlier this year."

"Soft Sheen is still number one when it comes to innovation," adds Dan Medow, president of Detroit-based Standard Distributing.

"Soft Sheen has the best marketing strategy of any ethnic company," says Chuck Lewman, president of Los Angeles-based Paul's Sundries.

"They build a salon business, educate the consumers

Continued on page 28

Percentage change in annual ethnic product dollar sales

(In millions)

Retail segments	1986	1987	1988	1989*
Drug	8.1%	6.2%	(0.2)%	7.5%
Food	(0.7)	(0.9)	(1.7)	5.4
Mass merchandise	(11.6)	(8.6)	90.2**	(5.8)
All mass retail outlets	2.9	(5.1)	10.4	4.2

*For the 12-month period ending March/April
**Reflects a change in sample size.
Source: Nielsen Marketing Services

Ethnic Merchandising

BEAUTY TRENDS

Ethnic hair design facing the '90s with style, flair

By Jocelyn T. Amador,
Associate Editor,
Sophisticate's Black Hair Styles And Hair Guide

The beginning of a new decade brings with it exciting shapes, textures and colors for black hair design.

New technology has produced innovative products which make it possible for today's stylists to turn their design visions into reality.

What will be popular in 1990? What maintenance products can retailers expect to see a demand for?

At *Sophisticate's Black Hair Styles and Care Guide*, the leading black hair consumer newsstand publication in the nation, we see a number of things happening.

Right now, the dominant hair fashion is, as it has been for the past several seasons, variations of the "high hair" design, looks with volume plus height.

With the advent of the 1990s, we will see a movement toward sleeker, neater styles which will take their clue from the slim clothing silhouettes so prevalent in the fashion industry.

Emphasis will be placed on horizontal movement, with more fullness extending out from the sides and "flatter" head shapes as opposed to the vertical silhouette of the past.

'90s look will be customized

Gone are the days when only one cut dominated hair fashion. In the '90s the look will complement an individual's life-style, fashion preferences and available maintenance time.

Taking their cue from the changing demand of customers, manufacturers are now formulating products that either stylists or consumers can use to cater to specific needs. For example, Be Natural Products, a subsidiary of Pantresse, Inc., has introduced the Short Cuts Salon Styling System to aid in styling cropped cuts; and Soft Sheen Products, Inc. has its Wave Nouveau body perm system, which stylists use to create designs that have the look of a relaxer but with the versatility of the curl.

The new popularity of wigs, such as those designed by the Naomi Sims Collection, Afro World and The Hair Factory, also give consumers their choice of a wide variety of individualized looks with minimal fuss.

The looks to come

As editors at *Sophisticate's Black Hair* magazine see it, the new styles this season will be soft, sleek and swingy.

Shapely little cropped cuts, reminiscent of the dome or bowl shapes which hug the head, will dominate.

Singer Deniece Williams models a longer style with a smooth texture and forward moving fringes.

Scalps, in turn, will have to be kept healthy, and to manage this, it will be necessary for consumers to use deep-penetrating conditioners, such as the Estolin Castor Oil Treatments.

Shape is now more important than length. The latest cuts complement the facial structure. Tresses are shaped to move forward toward the center of the face, with the help of clipped bangs and fringes.

You'll soon be seeing variations of the shag cut, in particular, the "square shag" crop, so named because it gives extra volume at the sides while the crown area is kept flat for a squared-off silhouette. Controlled looks like these can only be achieved with products that keep the line of the cut such as Worlds of Curls Phase 2 Home Care System.

Moving with the flow

In order to achieve the necessary movement in the hair, these new streamlined designs require the mane to be at least partially relaxed.

Hair care manufacturers are responding to this trend with improved relaxer formulas which are gentler on the hair while providing the added bonus of a conditioning treatment. Pro-Line's Soft and Beautiful Volume Plus No-Lye Relaxer, Luster's PCJ No-Lye Conditioning Creme Relaxer, and Revlon Realistic No-Lye Creme Relaxer are just a few examples.

High shine

The sleeker, smoother textures that are emerging now for the '90s require that hair be healthy so it can reflect a high, shiny gloss.

Styling aids such as Revlon's Realistic Finisheen Oil Sheen & Conditioning Spray help enhance gleam.

In addition, products that help prepare the hair for styling, such as Luster's Pink Oil Moisturizer, Lustrasilk's MoistureMax Oil Moisturizer Hair Lotion, LeKair's Styling Gel and All Ways Natural's Super Gro, along with a complete maintenance line like Knight Hair Care's Knight Nutritional Hair Supplements, American Beauty Product's hair care line, and Dorum's Leisure Curl line will encourage customers to follow a regular maintenance program at home.

Great lengths

The popularity of hair extensions will also continue to be strong into the next decade. Complete easy-to-use kits such as Pro-Line's Weave Re-Nu Weave Maintenance System and Gentille's Hair Weaving Maintenance System are just some examples of the types of weave care products that consumers will be looking for.

With the advent of the 1990s, we will see a movement toward sleeker, neater styles which will take their clue from the slim clothing silhouettes so prevalent in the fashion industry.

Singer Anita Baker favors a pixie cut that hugs her face. The look accents her eyes and delicate bone structure.

Actress Anne-Marie Johnson from "Heat of the Night" prefers a variation of the shag cut, updated for the '90s with a slightly square silhouette.

Color innovations

Hair color will continue to play an important role in the year ahead. The trend now is leaning toward darker, deeper, richer hues which play up the simple silhouettes of the season.

Manufacturers such as Carson Products' Dark & Lovely and Clairol's Nice & Easy are developing new color collections which will include this rich color spectrum. Carson Products' Reviving Colors is also popular with women who want to enhance the natural color of their hair.

But the most important fact about black hair care fashion is that it is constantly evolving and changing. It is always the latest innovative designs that define the look of today's modern black consumer.

And it is the challenge of staying on top of these many changes that makes the future of black hair design so exciting for the editors at *Sophisticate's Black Hair Style and Care Guide*, for stylists and for retailers who provide the maintenance products that the modern black consumer needs to remain in fashion.

British singer Mica Paris sports the clean lines and rounded shape of the new look of the '90s. All photos on this page courtesy of *Sophisticate's Black Hair Styles & Care Guide*.

Helping black women pick cosmetics best for their skin types

Type of product	Recommendation
Foundations	Suggest a foundation formula based on skin type and desired coverage. Stay with formulas that produce medium to maximum coverage to create a unified skin tone. Recommend an oil-free foundation for women with oily skin. Suggest that a woman with normal skin use a water-based formula. And recommend an emollient foundation like a matte cream for a woman with dry skin. Advise against foundations that reflect a red, rosy or ashy hue. Look instead for a foundation that gives warm, olive tones.
Face Powder	If a woman buys a foundation, recommend she buy a face powder as well. If she buys the powder, suggest a foundation to complete the look she's after. Recommend a translucent powder to set or a tinted powder to correct or tone the foundation. A translucent powder will also absorb shine, especially on the nose.
Cheek	Advise against frosted shades. Recommend rich reds-plums for dark skin tones. Warm tawny shades for medium to light skin tones.
Eyes	Avoid frosted colors. The best and safest choices are matte browns, prunes, burgundies and rose. Recommend semi-frost roses, beige and gold colors for highlighting underneath the brow.
Lips	Go for color. Avoid high frost, chalky, pale colors. For uneven lip color, recommend applying foundation to the lips to even out the lip color. This will insure stay-true color. Suggest that your customer try complementing the color on their lips to various eye shades.

Source: Clarissa Wilson, Simply Satin Cosmetics

BEAUTY TRENDS | **Ethnic Merchandising**

New looks and hot promotions make waves in ethnic business

Market share change in ethnic product sales

(Percentage share in annual dollar sales in millions)

Retail segments	1985	1986	1987	1988	1989*
Drug	59.2%	62.2%	61.5%	55.6%	57.4%
Food	26.1	25.2	26.3	23.4	23.7
Mass merchandise	14.7	12.6	12.2	21.0**	19.0
All mass retail outlets	100.0	100.0	100.0	100.0	100.0

*For the 12-month periods ended March/April

** Reflects a change in sample size.

Source: Nielsen Marketing Services

Continued from page 23

a strong demand when they hit the retail stores."

Lewman thinks that between Optimum Care and the current emergence of new dry curl maintenance products, retailers could see category sales increase as much as 7 to 8 percent over the year's final few months, he estimates.

In the men's hair care market, however, the fashion outlook is a little less exciting. Men are still wearing their hair short, but more men may be letting it grow out on the top of their heads, and more men may be opting for geometric cuts.

In the Midwest, Medow said he has noticed a slight change in styling preferences for men. He said they seemed to be growing their hair longer on top while keeping it short on the sides.

"It's the 'high top look,' " he says, "and although it's too soon to say, it could cause men to start buying more styling, conditioning and texturizing products."

On the West Coast, Lewman says short hair is still very in. The geometric cuts are visible, but they don't seem to be as strong or as popular there as in the East and Midwest. "Basically," he says, "we're still seeing a lot of short hair and that means our strongest sales are in good, basic maintenance products, conditioners and hair treatments especially.

Lewman says that in his area, petroleum-based products tend to do exceptionally well because they moisturize the hair. He says he's noticing that castor-oil conditioners have become a "sleeper" category, doing a good, solid business year round.

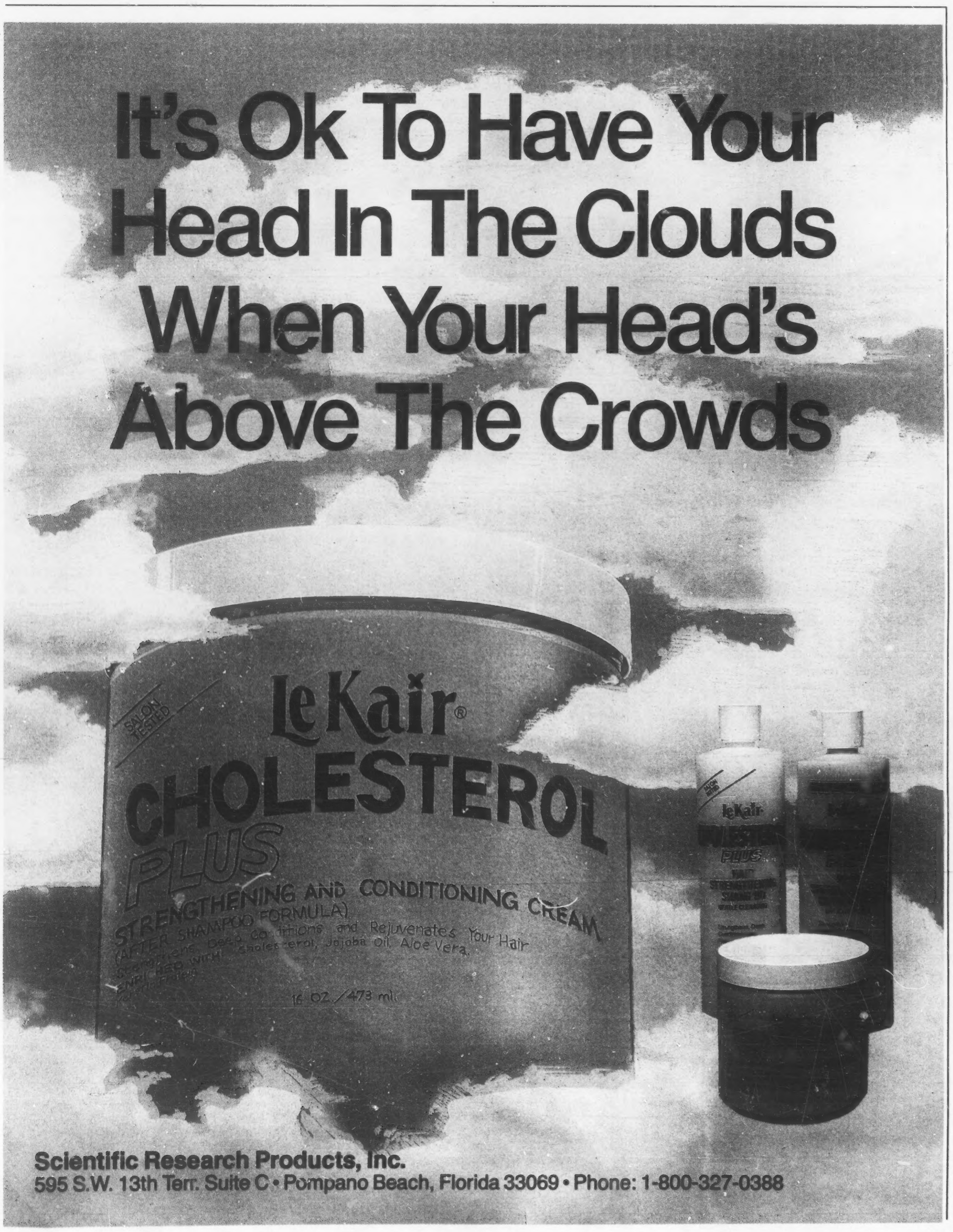
His three best sellers are the All Ways Natural Castor-Oil for the Hair, Isolplus Castor-Oil and Bonner Brothers Castor-Oil.

The braid look is still popular, especially on the West Coast, but distributors say the style's popularity has not

yet reached the point where sales can be translated to the retail market.

In the spritz category, Medow thinks ethnic product manufacturers are starting to capture sales more effectively from general market brands. "Until recently, there's been a lot of crossover buying with spritz," he says, "but now the ethnic product manufacturers are starting to catch up."

Photos: ©Sophisticate's Black Hair Styles & Care Guide.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Luster sales vp elected as AHBAI chairman

CHICAGO — Jory Luster, vp-sales and marketing at Luster Products Co., has been elected chairman of the American Health and Beauty Aids Institute.

Luster succeeds Gary Gardner, president of Soft Sheen Products. Gardner served as chairman from 1987 through August 1989.

Geri Duncan Jones, executive director of AHBAI, described Luster as "one of the most dynamic young leaders in the industry today."

She said that the AHBAI's "commitment to growth in both the retail and professional segments of the industry will be enhanced by his leadership."

Since its founding eight years ago, AHBAI has grown to become a leading force in the ethnic H&BA industry.

BEAUTY TRENDS | **Ethnic Merchandising**

Buyers pick ethnic products that are 'leaders of the pack'

Ethnic product sales five-year growth trends

(Annual dollar sales in millions)

Retail segments	1985	1986	1987	1988	1989*
Drug	$152.7	$165.0	$154.9	$154.5	$166.1
Food	67.2	66.7	66.2	65.0	68.6
Mass merchandise	37.9	33.5	30.6	58.3**	54.9
All mass retail outlets	257.9	265.3	251.6	277.8	289.5

*For the 12-month periods ended March/April
** Reflects a change in sample size.

Source: Nielsen Marketing Services

Continued from page 23

through the salon people, then when their maintenance products reach a critical mass point, they take them out of the salon and into retail and they hold the allegiance of the salon people by giving them something new to work with," Lewman added.

"Several years ago, they [Soft Sheen] streamlined their operations, and starting with Gold, they've been on a winning streak," says Mike O'Neil of Harris Beauty Supply in Atlanta. "They successfully launched their Sporting Waves Texturizer Kit. Their sales for Care Free are strong, and now they have had a great launch with Optimum Care."

Carson

Carson is another company often singled out for being innovative and strong on marketing. The Carson line of Revitalizing Color highlighters, launched nearly two years ago, is moving well at retail now, sources said.

The innovative line was the first to let women add color to their hair immediately after relaxing it rather than two weeks later. It was also the first retail line to let women enhance the natural color of their hair while adding highlights, as opposed to covering their natural color with permanent coloring.

"It probably brought new users into the hair color category," says Medow. "It gave women who were uncertain about coloring their hair an easier way to go."

One source called Carson "the most progressive company in the market," adding that it usually has "the best marketing programs and follows through with commitment."

Our sources also singled out Culver's TCB division and Luster Products for being exceptionally skillful at marketing their products. Both companies are aggressive with bonus packs, which are helping them gain market share, buyers said.

Culver/TCB

TCB at press time was shipping what appears to be the industry's first 75 percent-off bonus pack on its TCB 14-ounce hair and scalp treatment and hair food conditioner. TCB has priced the 14-ounce pack at regular 8-ounce retail.

Buyers said that among styling aids, the TCB Oil Sheen is a top seller even though it is priced higher than some competition.

Mike O'Neil at Harris described TCB's new Unscented Oil Sheen as "fantastic." While reports on the new Design Effects line are mixed, some sources say the line is doing very well, especially in the Midwest where Chicago-based Culver has a loyal following.

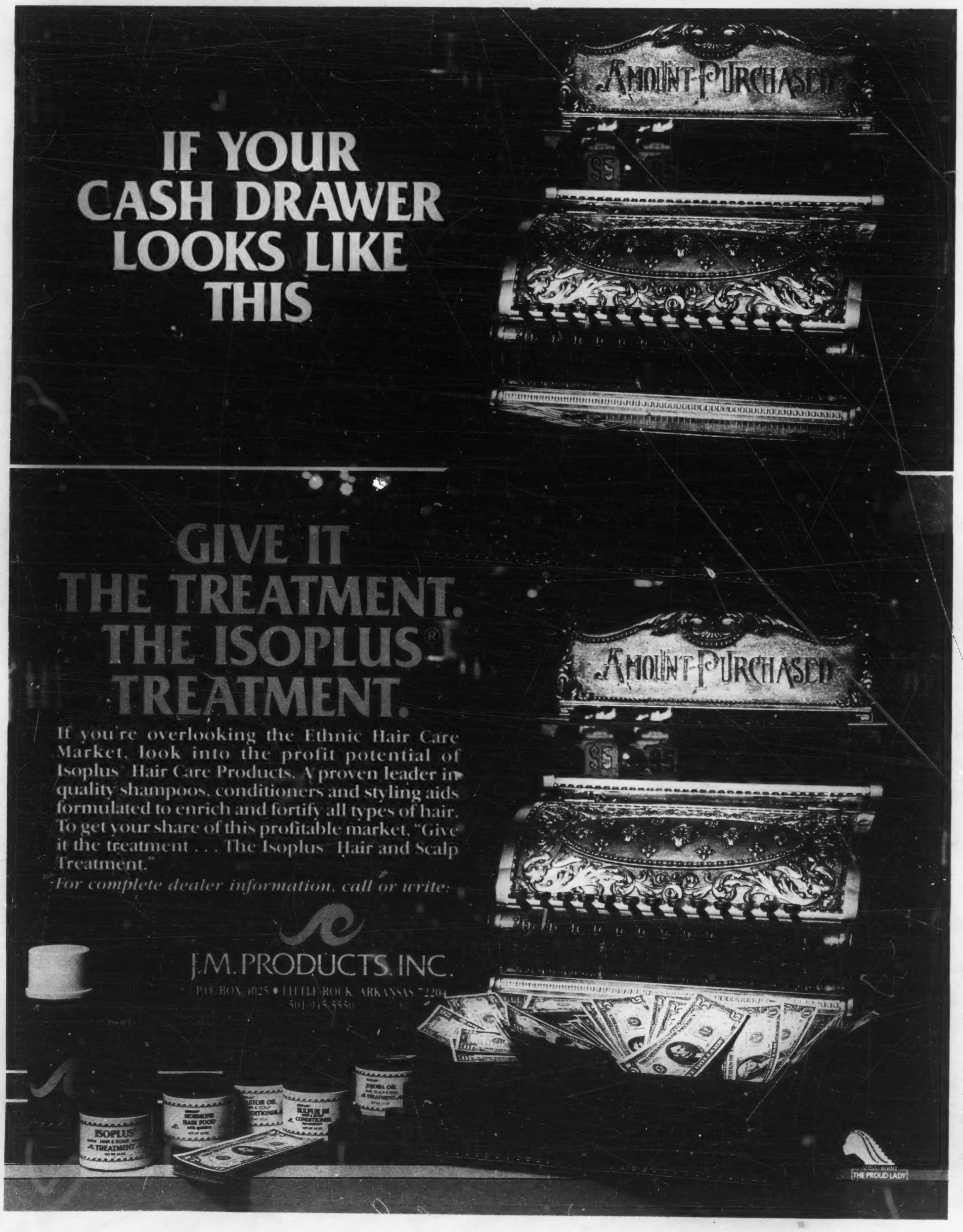
Luster

Luster has just finished a successful bonus pack, offering 50 percent off its Pink Oil moisturizer.

Luster also stages one of the industry's best consumer promotions: its S-Curl Male Model search.

Luster does a good job pass-

Continued on page 30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BEAUTY TRENDS

Ethnic Merchandising

Buyers pick 'leaders of the pack'

Continued from page 28

ing on bonus packs and other added-value programs, like 50 percent more product free, one trade source said. "They don't have many items, but what they have they do well with. Moisture Oil, for example, has been around for 20 years or so, but they were the first to come out with the Pink Oil concept."

Pro-Line

Pro-Line was also singled out, for being aggressive and for figuring out what the consumer wants "from the grass roots up." They were the first to come out with a men's comb-through kit and "that flew through the stores," said one source.

Chuck Lewman, president of Paul's Sundries, singled out Pro-Line as a "consistent manufacturer who keeps things happening. They're like the baseball player who consistently hits singles and doubles instead of always going for the home run," he said.

"Most of the time, companies are just bringing out 'me too' products in this industry," said Ken Humphreys of Jack's Service. "Pro Line is not a 'me too' company. They find a good product. They develop good packaging, and they're innovative."

Revlon

Revlon was also singled out by many buyers as above average, primarily because it promotes so aggressively. Many agreed that to consumers, the Revlon name "is magic."

"They know how to get the most mileage from their advertising in fashion magazines," said Chuck Lewman at Paul's.

Revlon's Creme of Nature, for example, has been around for years with a strong following. Sales have risen dramatically in recent months, largely because the company has stepped up consumer support for the brand. Couponing has also been aggressive, helping Creme of Nature to capture trial sales that lead to repeat purchases.

Revlon was also singled out by many buyers as above average, primarily because it promotes so aggressively. Many agreed that to consumers, the Revlon name "is magic."

Lustrasilk

Since being acquired by Gillette, Lustrasilk's star has been rising with retailers. One buyer said the company "keeps its word about advertising and is very strong in positioning products to different niches in the market." Most of the sources added that Lustrasilk seems to have another winner this year with its launch of Moisture Max.

Posner

According to many buyers, Posner has emerged as the strongest mass market ethnic cosmetics line. Several distributors went so far as to say Posner is their best selling line, with sellthrough helped by complete programs and ongoing introductions of shades.

Worlds of Curls

Most buyers described Worlds of Curls as a "good, solid company" that is successfully negotiating the passageway from strong regional to national player. Buyers say it does a good job with bonus packs, and it has one of the best-selling curl activator gels and moisturizers on the market.

Johnson Products

The consensus among buyers about Johnson Products is that while it may not have done anything particularly dramatic lately, its management has moved ahead in a consistent and reliable fashion and is continuing to do an especially good job to support Johnson's Gentle Treatment relaxer line which remains a top seller.

Kiwi Products

This year, a number of buyers said their ethnic skin sales are growing, particularly earlier this year when sales in some markets were up by as much as 15 percent. Buyers credited Kiwi Products for its intensified support for Ambi, and Plough for its increased support of Artra.

Continued on page 32

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BEAUTY TRENDS | Ethnic Merchandising

Buyers pick ethnic product leaders

Continued from page 30

Most sources said Kiwi has developed excellent marketing programs for Ambi, which helped make Ambi the leading brand in ethnic skin care.

Plough

For years, Plough has had some very good brands in ethnic products, Black & White, Artra and Sulphur 8, for example. In 1989, Plough's increased attention to these brands began paying off, buyers said.

Plough eliminated its direct sales force and signed on with ethnic product distributors. It also repackaged some of its lines, and has been much more aggressive in promoting and advertising them. Sources said Plough plans to continue to increase support for its brands.

Several buyers also said that as sales of the Venus de Milo skin care line continued to decline, Plough has been able to effectively position Artra as an attractive alternative. Artra has now become, most sources said, "a very strong number two to Ambi in skin care."

Supreme Distributors

Supreme supported Raveen so well last year with coupons, rebates and other price discounts that it succeeded in taking market share from category leader Dark & Lovely, sources said.

Carson fought back by repackaging Dark & Lovely, and its share is up this year, according to most sources, but the gains haven't come at Raveen's expense.

Most sources say Raveen is still shooting out the doors, but this time without as much aggressive discounting.

D'orum

According to many buyers, D'orum is a good example of a company "in the right place at the right time." Although some buyers say D'orum as a company could be more flexible, there is no argument that its maintenance products in the Leisure Curl line are popular.

Leisure Curl evolved from D'orum's professional or salon lines, and the consumer apparently associates the brand with high quality and a salon image.

J. M . Products

Among the smaller regional companies, a firm named J.M. Products has been making a splash with Stylecrest ISOLPLUS, a conditioner/hair dressing.

Some distributors think that Stylecrest ISOLPLUS sales may still be strongest in

the Southeast, where J.M.'s headquarters are located, but they add that the brand is becoming more national everyday.

W & W Pharmaceuticals

Several buyers also singled out W & W as a superior regional, noting that Back Alive Curl Revitalizer is a strong category seller. They cite the brand's bonus packs and consumer value orientation.

Afrotique

Just about every buyer mentioned Afrotique, a division of Sara Lee, as the leader in the hosiery category. "It's an unbelievable line," said Michael O'Neil from Harris Beauty Supply. "They promote every quarter and it just blows out of the stores. They've got a very good program, and are expanding at a rapid rate."

The Satin Doll, Dark & Lovely and Brown Sugar hosiery lines were also singled out for doing well in several markets.

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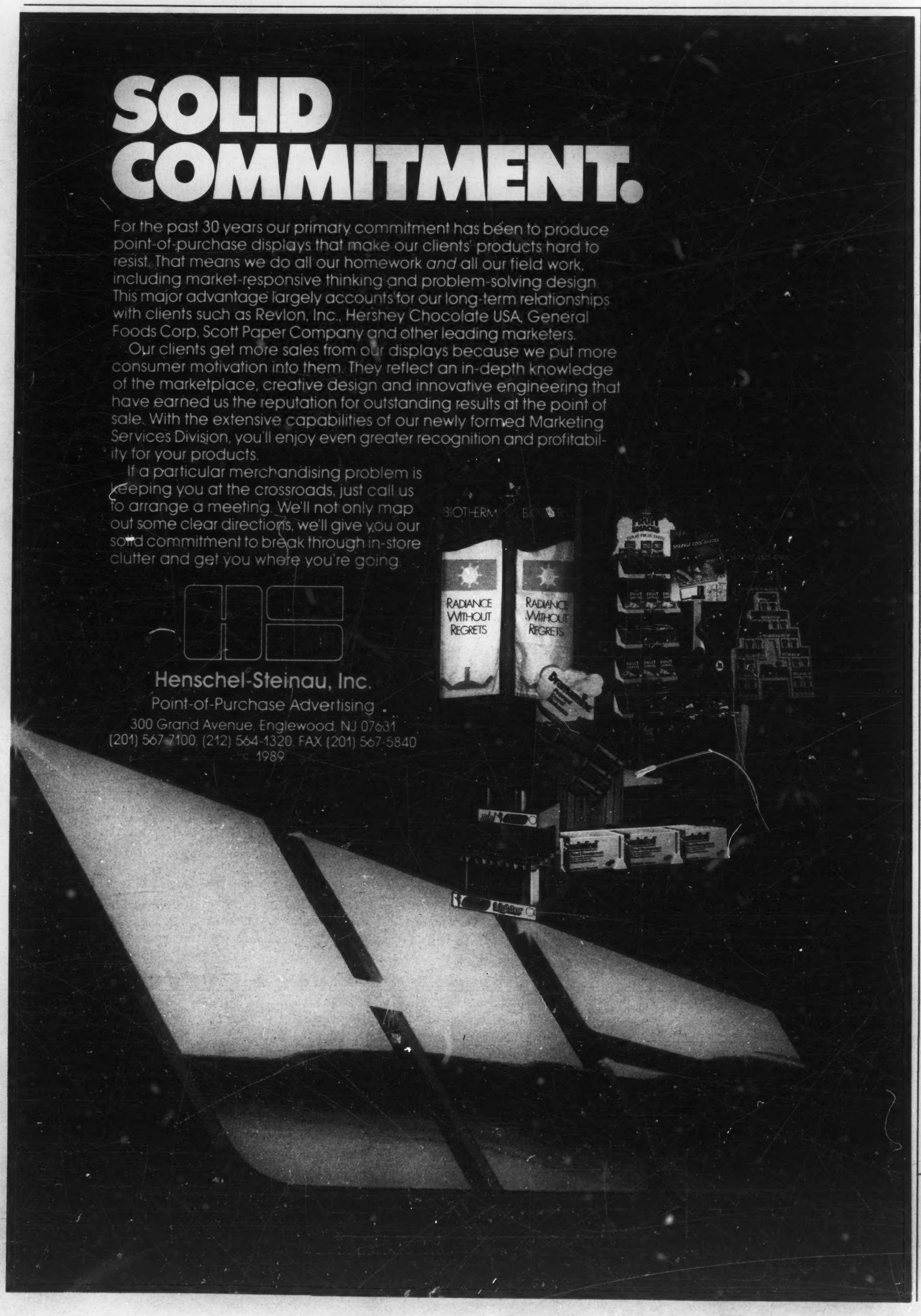

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BEAUTY TRENDS | **Ethnic Merchandising**

Beauty and barber shops competing for share of ethnic sales

Beauty and barber stores, which stock large assortments of ethnic products in ethnic neighborhoods, are continuing to grow dramatically.

In the Midwest, the West Coast and New York especially, B & B shops are proliferating, up to nearly 5,000 in total, according to best estimates. Many are mom-and-pops, but effective nevertheless. Distributors say much of their own growth is coming from the ongoing expansion of this retail class of trade.

Sally's Beauty Supply, of Alberto-Culver, is one chain expanding into new markets like the Mid-Atlantic. Many buyers, however, consider the chains less of a threat than the independents.

"The chains come into a market and they basically have one overall price," says Hollis Hill of Harris Beauty Supply. "But the independents come in and they scour the competition. Once they know what their immediate competitors are charging, they under-cut them in price, and it's very hard to stay ahead of them on pricing."

In Detroit, Dan Medow of Standard Distributing estimates that beauty and barber shops may be capturing as much as 30 percent of all ethnic product sales. He qualifies that by noting there is no way to tell for sure what their volume is. "I do know for sure it is going up," he said, "and that's one reason why many drug chains are reporting flat to moderate sales growth."

In some neighborhoods, the B & B stores go after the ethnic shopper on a combination price/assortment/service basis.

They generally stock two or three times as much product as the average chain drug store in high-volume neighborhoods, plus their clerks are usually well trained in product knowledge. Many B & B owners and managers have salon backgrounds, know how to answer customers' questions and make recommendations.

In some areas, the B & B stores go after the ethnic shopper on a combination price/assortment/service basis.

The drug chains that compete with them have taken to stressing their low everyday prices, their "commitment" to the category, and their varied assortments.

Many drug chains also respond to this competitor by advertising ethnic products more frequently, more aggressively and staging in-store promotional events to pull in the business.

Walgreens, for example, just ended a successful promotion that offered shoppers an excellent price on an assortment of hair relaxers.

The chain advertised and displayed five relaxer kits. The consumer could buy any brand for just $5.99. On some brands like Revlon's No Lye Relaxer, they were able to get $5 back through a Revlon rebate.

For Dark & Lovely, Soft & Beautiful, and some other brands, rebates were a more moderate $2 to $3. One source says the products "flew" out the doors.

Food chains more aggressive

On the West Coast and in other areas, food chains are also growing more aggressive with this category. Their strategy is to aggressively promote ethnic H&BA items to attract black and Hispanic shoppers, who will then presumably shop the entire store.

Albertson's and Lucky, in particular, have been beefing up their ethnic products departments, including their assortment of products for Hispanic shoppers.

Ralph's, another West Coast-based food chain, is now testing ethnic hosiery; the Satin Doll line made by Illinois-based E.R. Williams. In test stores, one source says the line is currently accounting for between 9 percent and 20 percent of total ethnic sales, depending on the store.

In the Mid-Atlantic, Safeway has also expanded its commitment to ethnic. Like Walgreen and K mart, Safeway is now taking out regional ads in major black publications like *Essence* and *Ebony*.

Kroger is taking a similar

Continued on page 38

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Ethnic Merchandising

BEAUTY TRENDS

Harco uses coupon book to boost sales of ethnic products

At Harco Drug management is promoting ethnic more aggressively than ever. In high-volume stores that strategy has helped, says ethnic products buyer Charles Monk.

"The problem with the category is that there's nothing really hot going on right now with hair styles," he notes. "Until something new comes along, you have to drive sales with advertising."

Harco, which has a minimum four-foot ethnic set in all but one of its stores, emphasizes promotions of major product lines so they perform well throughout the year. Out of 32 annual circulars, ethnic is represented in about 75 percent.

Coupon book promotion

But this year, Harco is doing something extra and rather unusual to reach black shoppers.

The chain is tying in with Coca-Cola and its dealers on a coupon book that will be offered to churches in Tuscaloosa and Selma, Ala. where Harco has many black neighborhood stores. Coupons for a variety of products will be worth $25 and won't expire for six months. Consumers who buy the book from churches for $3 each will also have chances to win an all-expense-paid vacation that includes a visit to the Apollo Theatre in New York City.

Harco also plans to award cash prizes of $200, $350 and $700 to the churches that have the largest percentage of redeemed coupons. There are separate cash prizes for both large and small congregation churches.

"When you get the blessing of the church behind you, it makes your promotion all the stronger," says Monk.

"It also shows that we're trying to put something back into the community," says Monk, "because we're also tying the booklet in with another program that will start a $3,000 scholarship for students attending Stillman College."

TCB will be in the booklet with a $1-off-any-product coupon. Worlds of Curls will have a 50 cents-off coupon good on any purchase of its 32-ounce

BEAUTY BEAT

ELIZABETH PARKS

activator. Gentle Treatment will offer $1 off; LustraSilk, 50 cents off. Revlon Realistic, Artra, the Money House Blessing room scent sprays from the E. Davis Company and Soft & Beautiful will also participate.

General product brands will also be represented. Procter & Gamble will have a 20 cents-off coupon good for Charmin; Warner-Lambert will have a coupon for its E.P.T. pregnancy kit. There will be a 50 cents-off coupon on Massengill. Harco will also have several cents-off coupons on private label laxatives and beauty oil lotions. Coca-Cola will have a $1-off coupon on its 16-ounce six-pack.

May go chainwide

Monk says that if it works, Harco will probably take the program chainwide. There are 12 stores in the cities where the program will be done, but the coupons will be redeemable in any Harco store.

The hardest part of the program, Monk says, is coordinating it. There are about 100 churches, he says, in Tuscaloosa alone.

To make the promotion easier to coordinate and more visible to consumers, Harco and Coke are also tying in with two black radio stations that will advertise the booklet and serve as the central source of distribution. Churches that participate in the program will pick up booklets from the radio stations.

Harco will act as the clearinghouse for coupon returns. Each church will stamp its name on the back of coupons.

Monk says Harco is taking this one extra step because black shoppers are very important customers. "For one thing, they're very loyal customers. Once you have them, they stay with you as long as you treat them right and you're fair.

"If you're out of stock on something, a white customer will often go down the street. But a black customers is more loyal and they'll come back. They also visit you a lot so even if they don't always buy a lot at any one time, they come back and buy more often."

In addition to their regular ads, Harco also runs print ads in black college newspapers.

DrSN *Council of Cosmetic and Fragrance Advisors*

Retailers

Denise Boyer ..... Longs Drug
Kathy Covault ..... Drug Emporium
Beth Dugan ..... Rite Aid
Stephanie Hayter ..... Genovese
Steve Lubin ..... Walgreens
John Mirmelstein ..... Revco D.S.
Mike Russell ..... Hook-SupeRx
Elaine Sartini ..... American Stores
Vicki Williams ..... Peoples

Manufacturers

Jerry Abernathy ..... Coty
Gary Balkema ..... Shulton
Roy Benjamin ..... Cosmair
Paul J. Block ..... Revlon
Kent Doss ..... Chesebrough-Ponds
Dennis Field ..... Fabergé
Marcia A. Levis ..... Almay
William McMenemy ..... Del Labs
Farnum M. Miley ..... Maybelline
Herm Schnitz ..... Max Factor
Arthur Schwalb . New Products Report

Beauty, barber shops vying for share of ethnic market

Continued from page 34

approach in the Midwest, where sources say the chain has been expanding space, assortment and promotions of the category.

K mart and Wal-Mart, of course, both compete strongly for black customers in ethnic neighborhood stores. Trade sources indicate that K mart's new ethnic products buyer has been told to turn up the competitive heat.

Of all the discount chains, K mart has been the most aggressive with the ethnic products category, and the most successful as well, according to sources.

In one Southeastern market where K mart has two dozen stores with large ethnic departments, sales for the majority of those stores were up "tremendously," with better than double-digit rates this past year, sources said.

Unlike Wal-Mart, which recently cut back on its assortment in order to go with a national warehouse program, K mart is using distributors to stock its stores. This chain is continuing to put a major emphasis on variety and selection.

Knowledgeable sources report that K mart is currently running at a 95 percent in-stock service level. In contrast, Wal-Mart has dropped down to a 60 percent rate in ethnic, a decline sources attribute to Wal-Mart's recent conversion to a national warehouse program.

K mart is also continuing to increase visibility of its commitment to the category by running ads in all the major black publications, including *Essence*, *Ebony* and *Jet*. The discounter always backs up these ads with massive off-shelf in-store displays for the products advertised, and in the interim periods between these magazine ads, regularly distributes in-store flyers and relies heavily on regional ads.

"They have a promotional program for ethnic going 12 months out of the year, including Christmas," said one source. "They have great selection. They work hand in hand with their distributors, and they're able to customize their mix to their territories, whether their stores are in Detroit or Los Angeles."

This year, sources say K mart is also starting to test a deep discount buying and pricing program for selected high volume products. The program is still just a test, but K mart is reportedly experimenting with buying select items on deal and then pricing them very aggressively to try blowing them through the stores.

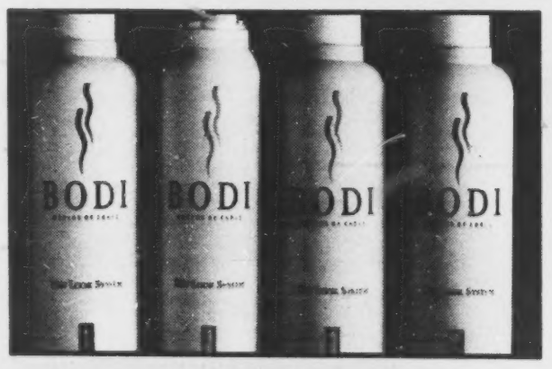
Some of the drug chains that K mart competes with are trying to adopt a similar "fight back" program, but right now they want to keep their identities off the record.

In addition to K mart, Zayre, Bradlees, Jamesway and Woolworth have also been generating growth with ethnic recently, sources said. Moreover, both Zayre and Jamesway have recently become very aggressive with flyers.

SCF celebrates 10th anniv.

Attending the kick-off for the Skin Cancer Foundation's 10th anniversary celebration are, from left, foundation president Perry Robins, M.D.; general chairman Michael I. Monus, president of Phar-Mor; and foundation secretary Eli D. Cohen of Duane Reade. The dinner dance will be held on Nov. 16 at the Marriott Marquis and Dick Cavett, the evening's host, will provide the entertainment.

Category in Motion



Worlds of Curls Products Inc. introduces Bodi. This is a hair care system for people with perms and curly styles who want to achieve a dry, non-greasy look.

Bodi is available in a complete four phase system, Light Shampoo (Shapoo DeBaine), Rich Conditioner (Forme), Creme Activator (LeCreme Hydratante), and Finishing Foam (Le Finir Attaque).

* * *

M & M Products and the American Safety Razor Company have created a special holiday bonus pack featuring complimentary on-pack 50 cent-off coupons.

Now through the end of the year, consumers who buy M & M's Sta-Sof-Fro Oil Sheen and Comb Out Conditioner will get an on-pack coupon worth 50 cents toward the next purchase of a PFB Bump Fighter Razor.

Consumers who buy the razor will receive an on-pack coupon good for 50 cents off their next purchase of either the Sta-Sof-Fro Extra Dry Oil Sheen, 8 ounce or 16 ounces, or the Rub On Oil Sheen, 5 ounce.

FINANCIAL

Amfac Health Care now integrating Northwestern

FOLSOM, Calif. — Starting an anticipated year-long process that expands its wholesale horizons, Amfac Health Care is now integrating Northwestern Drug into its daily operations.

Amfac (MWC Inc.) announced the purchase—for an undisclosed amount—of Northwestern this spring. The deal, completed recently, will give Amfac an entry into full-line wholesaling, since prior to the acquisition, the company relied primarily on hospital pharmacy customers.

Now, as owner of Auburn, Wash.-based Northwestern, Amfac is looking to combine the best of both businesses.

"We are working hard to find that blend of integration," Amfac chief financial officer Gary Close told *Drug Store News*.

Close said Amfac's strengths are hospital pharmacy and product availability responsiveness. Northwestern, he added, provides a healthy independent and small chain drug store business in the Pacific Northwest, plus an extensive product offering that includes front-end merchandise.

Amfac is integrating sales and management at the two companies and forming one regional office in the Pacific Northwest, one of the company's largest at an estimated $350 million annual volume. The region includes Washington, Oregon, parts of Alaska, Idaho, Montana and Northern California. Amfac expects overall revenues in 1989 to reach $1.2 billion.

Because hospital and retail businesses are operationally different, Close said each will have its own sales and management team, and no layoffs are anticipated.

While integration of personnel should be completed in October, Close said a complete combination of the two business' systems and operations will require approximately one year to complete.

Northwestern small chain and independent customers have seen few changes in the brief period following the acquisition. "I don't know if there is going to be much of a change," noted Mike Rossow, head pharmacist with Chehalis, Wash.-based discounter Yard Birds, operator of two pharmacies.

Sue Freese, co-owner of three-store Peninsula Pharmacies in Iwaco, Wash., noted few differences since the acquisition. Freese did note, however, that she expects her small chain to shorten ordering time, since product availability and distribution avenues have increased.

At Murray Drugs in Heppner, Ore., president Rod Murray expects his two stores to receive better service under Amfac. As a Northwestern customer in a remote area, Murray said he was not always able to get next-day deliveries from the wholesaler's distribution center in Seattle. Amfac, however, operates a facility in Portland, which is much closer to Murray and will make next-day deliveries.

Bindley reports sales, net hikes

INDIANAPOLIS — Bindley Western Industries reported increases in sales and earnings for the second quarter ended June 30. Sales, which reached $374 million, were the highest for any quarter in the company's history, 23 percent ahead of the comparable period in 1988, the wholesaler said.

Earnings for the quarter increased to $1.04 million from $1.03 million for the comparable period a year ago.

For the six months, sales rose to $737 million, compared with $614 million in 1988, while earnings declined slightly, to $1.94 million from $2.21 million.

Cardinal 1st qtr. sales hit $203M

DUBLIN, Ohio — Cardinal Distribution posted a 31-percent increase in net sales and a 58-percent increase in net earnings from continuing operations for the first quarter ended June 30.

First-quarter net sales rose to $203.3 million, from $155.0 million for the comparable period last year. Net earnings from continuing operations were $2.4 million, compared with $1.5 million for the year-ago quarter.

Total net earnings for the first quarter last year were $6.2 million, including net earnings from the company's discontinued wholesale food operations, and a non-recurring gain from the April 18, 1988 sale of those operations, in the aggregate amount of $4.7 million.

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MARKET DIARY:

Largest Dollar Gainer	Carter-Wallace	$ 4.75	Advances	19
Largest Dollar Loser	American Stores	$ – 3.50	Declines	37
Largest Percentage Gainer	Bolar Pharmaceutical	16.22%	Unchanged	4
Largest Percentage Loser	Zenith Labs	– 15.38%	New highs	8
			New lows	2

	Close 9/12/89	Close 9/26/89	Net Change	Percent Change
Drug Store News Index	2904.23	2886.55	– 17.68	– 0.61
Dow Jones Industrial Average	2707.26	2663.94	– 43.32	– 1.60
Standard & Poor's 500-Stock Index	348.70	344.33	– 4.37	– 1.25
N.Y.S.E. Composite	193.88	191.47	– 2.41	– 1.24
Value Line Index	276.61	274.86	– 1.75	– 0.63

Source: Nordby International Inc., Boulder, Colo.

DRUG STORE NEWS INDEX

Exch	Company	Ticker Symbol	Closing Price 9/12/89	Closing Price 9/26/89	Net Change In Period	Percent Change In Period	P/E Ratio	Annual Dividend Rate	Annual Dividend Yield	Annual High	Annual Low
Chain store transactions											
OTC	Arbor Drugs	ARBR	20.25	21.75	1.50	7.41	27	0.16	0.74	24.75	8.00
OTC	Big B	BIGB	14.75	14.63	– 0.13	– 0.85	17	0.16	1.09	15.25	10.63
OTC	Dart Drug Stores	DDRGC	0.34	0.38	0.03	9.09	d	0.00	0.00	2.50	0.25
OTC	Drug Emporium	DEMP	13.63	13.00	– 0.63	– 4.59	19	0.05	0.38	16.25	6.25
NYS	Fay's Inc.	FAY	14.13	13.38	– 0.75	– 5.31	18	0.20	1.50	15.00	8.63
ASE	Genovese Drug	GDX.A	11.25	11.13	– 0.13	– 1.11	15	0.24	2.16	12.88	8.75
OTC	Leroy Pharmacies (H)	LERYW	5.00	4.63	– 0.38	– 7.50	–	0.00	0.00	5.50	4.38
NYS	Longs Drug Stores (H)	LDG	43.13	43.00	– 0.13	– 0.29	15	0.96	2.23	44.13	33.63
OTC	Medicine Shoppe	MSII	30.88	29.88	– 1.00	– 3.24	23	0.10	0.33	31.75	20.25
NYS	Perry Drug	PDS	11.13	9.88	– 1.25	– 11.24	247	0.00	0.00	13.50	5.25
NYS	Rite Aid Corp.	RAD	39.63	39.13	– 0.50	– 1.26	17	0.82	2.10	40.75	29.13
NYS	Walgreen Co.	WAG	46.13	44.00	– 2.13	– 4.61	18	0.68	1.55	50.25	29.63
Wholesaler's transactions											
OTC	Alco Health Services	AAHS	24.25	23.25	– 1.00	– 4.12	17	0.00	0.00	30.38	19.50
ASE	Bergen Brunswig	BBC	26.00	26.13	0.13	0.48	14	0.32	1.22	27.00	15.70
OTC	Bindley Western Ind. (H)	BIND	8.75	9.75	1.00	11.43	18	0.00	0.00	10.00	6.63
OTC	Cardinal Distribution (H)	CDIC	26.00	25.25	– 0.75	– 2.88	16	0.10	0.40	26.75	16.00
OTC	Durr-Fillauer	DUFM	21.13	21.38	0.25	1.18	21	0.24	1.12	23.25	15.00
ASE	Ketchum (L)	KCH	4.63	4.63	0.00	0.00	d	0.00	0.00	7.63	4.38
NYS	McKesson Corp.	MCK	39.00	37.13	– 1.88	– 4.81	15	1.44	3.88	39.75	29.63
ASE	Moore Medical	MMD	14.63	13.75	– 0.88	– 5.98	d	0.00	0.00	15.63	9.00
NYS	Owens & Minor	OMI	12.75	11.88	– 0.88	– 6.86	19	0.26	2.19	15.88	11.38
Manufacturer's transactions											
NYS	Abbott Labs	ABT	63.00	61.38	– 1.63	– 2.58	17	1.40	2.28	66.00	44.13
NYS	American Home Products	AHP	99.63	99.00	– 0.63	– 0.63	15	3.90	3.94	103.00	76.38
NYS	Baxter International	BAX	22.38	22.38	0.00	0.00	16	0.56	2.50	24.38	16.25
OTC	Block Drugs Co. (H)	BLOCA	35.50	36.50	1.00	2.82	14	0.64	1.75	36.50	30.25
ASE	Bolar Pharmaceutical	BLR	18.50	21.50	3.00	16.22	13	0.04	0.19	32.25	16.75
NYS	Bristol-Myers	BMY	50.13	50.13	0.00	0.00	16	2.00	3.99	52.13	41.38
NYS	Carter-Wallace (H)	CAR	49.75	54.50	4.75	9.55	18	0.82	1.50	55.25	38.00
ASE	Forest Labs	FRX	35.88	37.13	1.25	3.48	30	0.00	0.00	37.88	21.50
ASE	Halsey Drug	HDG	6.00	6.06	0.06	1.04	20	0.00	0.00	7.38	2.38
NYS	ICN Pharmaceutical	ICN	6.25	5.75	– 0.50	– 8.00	64	0.00	0.00	7.25	5.63
ASE	Lee Pharmaceutical (L)	LPH	3.13	3.13	0.00	0.00	d	0.00	0.00	5.50	2.88
ASE	Leiner P. Nutrition	PLI	20.75	20.38	– 0.38	– 1.81	17	0.00	0.00	21.38	9.50
NYS	Lilly Eli Co.	LLY	59.63	60.00	0.38	0.63	20	1.35	2.25	64.25	42.25
NYS	Marion Labs	MKC	34.25	34.38	0.13	0.36	24	0.36	1.05	36.50	16.50
NYS	Merck Co.	MRK	71.38	71.13	– 0.25	– 0.35	21	1.80	2.53	77.63	53.50
NYS	Mylan Labs (H)	MYL	14.50	14.88	0.38	2.59	35	0.10	0.67	15.63	7.50
OTC	Newport Pharmaceutical	NWPH	4.44	4.38	– 0.06	– 1.41	d	0.00	0.00	6.63	1.75
NYS	Par Pharmaceutical	PRX	5.75	5.88	0.13	2.17	10	0.04	0.68	12.50	3.88
NYS	Pfizer Inc.	PFE	69.00	66.38	– 2.63	– 3.80	15	2.20	3.31	70.75	53.75
NYS	Robins, A.H.	RAH	32.25	31.88	– 0.38	– 1.16	14	0.00	0.00	33.50	21.88
NYS	Rorer Group	ROR	42.88	43.63	0.75	1.75	21	0.80	1.83	48.25	36.13
OTC	Scherer RP Corp.	SCHC	15.75	13.50	– 2.25	– 14.29	d	0.40	2.96	33.38	12.00
NYS	Schering Plough	SGP	75.75	73.75	– 2.00	– 2.64	19	1.80	2.44	78.75	52.50
NYS	Squibb Corp.	SQB	118.13	119.75	1.63	1.38	25	2.00	1.67	120.63	63.25
NYS	Syntex Corp.	SYN	45.50	45.25	– 0.25	– 0.55	17	1.50	3.31	54.50	36.50
NYS	Thiokol Inc.	TKC	15.25	14.50	– 0.75	– 4.92	16	0.30	2.07	125.00	12.38
NYS	Upjohn Co.	UPJ	38.63	37.38	– 1.25	– 3.24	19	1.00	2.68	42.00	27.00
NYS	Warner-Lambert	WLA	107.50	106.50	– 1.00	– 0.93	19	2.56	2.40	114.63	70.75
NYS	Zenith Labs	ZEN	1.63	1.38	– 0.25	– 15.38	d	0.00	0.00	2.75	1.13
Other retailer transactions											
NYS	Albertson's	ABS	53.75	53.25	– 0.50	– 0.93	20	0.80	1.50	55.00	32.75
NYS	American Stores	ASC	65.75	62.25	– 3.50	– 5.32	27	1.00	1.61	72.50	51.50
NYS	Giant Food	GFS.A	31.38	31.50	0.13	0.40	18	0.50	1.59	36.25	21.00
NYS	K-Mart	KM	42.00	39.25	– 2.75	– 6.55	10	1.64	4.18	44.88	33.75
NYS	Kroger	KR	19.38	18.25	– 1.13	– 5.81	d	0.00	0.00	59.00	8.38
NYS	Melville Corp.	MES	50.75	48.63	– 2.13	– 4.19	15	1.30	2.67	53.63	34.00
OTC	Fred Meyer	MEYR	20.00	19.63	– 0.38	– 1.88	14	0.00	0.00	23.00	14.00
NYS	Penney, JC	JCP	67.25	68.13	0.88	1.30	11	2.24	3.29	68.75	49.50
NYS	Smith's Food & Drug (H)	SFD	22.75	24.75	2.00	8.79	23	0.20	0.81	24.88	20.50
NYS	Wal-Mart	WMT	40.13	39.63	– 0.50	– 1.25	24	0.22	0.56	43.88	29.25

Key: (H) = New high in period. (L) = New low in period. (d) = Deficit. NYS = New York. ASE = American. OTC = Over the counter. (s) = Reflects stock split.
Source: Nordby International, Inc., Boulder, Colorado